


Effective Bidding for IFI Projects

Hussein Amery
Integrated Development Enterprise Associates

September 5, 2008
Winnipeg





Workshop Overview

The workshop is designed to clarify key elements of effective bidding practices in the IFI marketplace.



Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008

2



International Development

Development is a complex, long-term process that involves all of the world's people, governments and organizations at all levels in the private and public sectors.




Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008

3

International Development

- The U.N. Millennium Development Goals guide all development



The United Nations Millennium Declaration* sets the global agenda for the start of the 21st century. Adopted at the Millennium Summit (New York, September 6-8, 2000), by 147 heads of state, and 191 nations in all, the Millennium Declaration defines the values, thematic issues and goals, some specific and time-bound, to guide the daily activities of the UN and its programs, so that globalization becomes a positive force for all the world's people.

Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008


International Business Development

International Development Business is underpinned by policies and strategies of countries, donors and International Financial Institutions:

- Poverty Reduction Strategy Papers (PRSPs)
- Sector Wide Approaches (SWAps)
- National Planning Frameworks
- Development Organization Country Program Frameworks (such as CIDA, DFID, USAID, etc.)

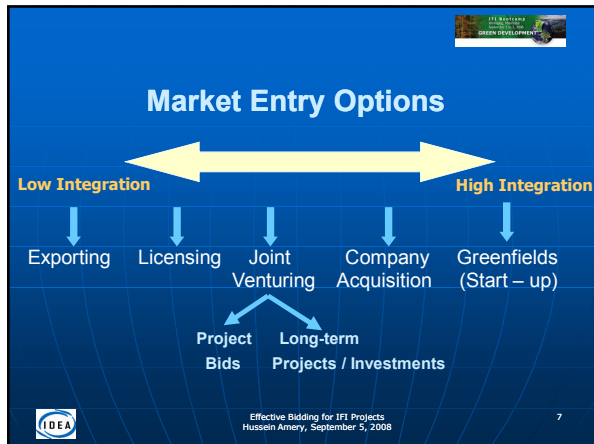
Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008

General Options for Foreign Market Entry



Low Integration	High Integration
<ul style="list-style-type: none"> ■ Lower investment risk ■ Minimal involvement ■ Lower control ■ Risk of unknown high 	<ul style="list-style-type: none"> ■ Higher investment risk ■ Maximum involvement ■ Higher control ■ Risk of unknown still high

Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008



-
- The Strategic Approach**
- Develop a strategy (Country targets, sector focus; commit time & resources)
 - Knowledge (learn about IFI market, the IFIs, your sectors of activity)...
 - Identify / Research Opportunities (i.e., projects in pipeline (MOS), procurement notices) on line
 - Partnership for Success
 - Participate in the bidding game (EOIs, proposals)
- Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008

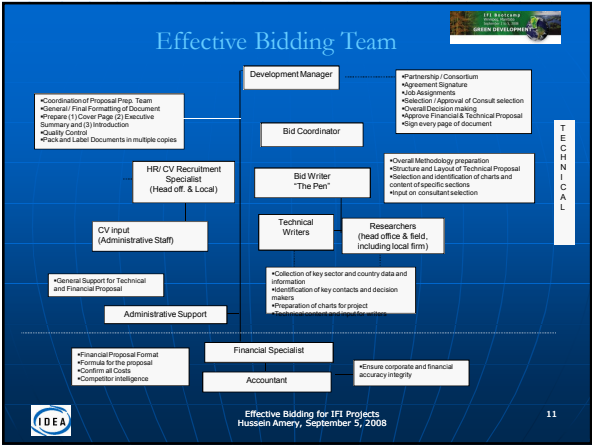
-
- Market Intelligence**
1. Identify opportunities at the approval stage of the project cycle
 2. Establish a Local presence
 3. Conduct Site Visits to target countries,
 4. Secure Local/ International Partners, Contracted Agents, or Network of institutions
 5. Contact IFI Liaison Offices
 6. Work with Canadian Trade Commissioners
- Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008




Approaching the foreign market place

- Step 1:** Establish a Business Development Unit (Effective Bidding Team)
- Step 2:** Research: Know the market and culture - Analyze options for market entry
- Step 3:** Set clear objectives, well defined strategies
- Step 4:** Plan (take strategic, systematic approach)
- Step 5:** Dedicate sufficient resources
- Step 6:** Be ready to be patient .. The time factor.

IDEA Effective Bidding for IFI Projects Hussein Amery, September 5, 2008 10





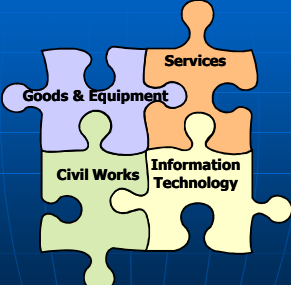
Multilateral Development Banks

Asian Development Bank (ADB)	Inter-American Development Bank (IDB)	World Bank (WB)	African Development Bank (AfDB)	Caribbean Development Bank (CDB)	European Bank for Reconstruction and Development (EBRD)
Location: Manila Regional, resident offices: Country: 49 Members: 62 Countries: 62 Borrowing: Members: 41 Canadian on Staff: 46 Canadian Participation: voting power: 4.6% permanent seat on 12-member Board	Location: Washington Member: Country: 49 Borrowing: Members: 26 Canadian on Staff: 25 Canadian Participation: voting power: 4% permanent seat on 14-member Board	Location: Washington 100 Regional, field, liaison offices: Member: Countries: 194 Borrowing: Members: 142 Canadian on Staff: 218 Canadian Participation: voting power: 3.05% 5th place with 5 others permanent seat on 24-member Board	Location: Tunis 7 regional offices, one in London: Member: Countries: 77 Borrowing: Members: 53 Canadian on Staff: 9 Canadian Participation: voting power: 3.3% permanent seat on 18-member Board	Location: Barbados Member: Countries: 25 Borrowing: Members: 17 Canadian on Staff: 1 Canadian Participation: voting power: 9.5% permanent seat on 24 member Board	Location: London 32 regional offices: Member: Countries: 60 Borrowing: Members: 27 Canadian on Staff: 1 Canadian Participation: voting power: 3.4% permanent seat on 25-member Board

IDEA Effective Bidding for IFI Projects Hussein Amery, September 5, 2008 12

IFI MULTIPARTNERSHIP
FORWARDING THE
GREEN DEVELOPMENT

Four Main Types of Procurement



Services
Goods & Equipment
Civil Works Information Technology

Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008

13

IFI MULTIPARTNERSHIP
FORWARDING THE
GREEN DEVELOPMENT

Awarding of Contracts at the IFIs

- There is no quota system that links the award of contracts to the size of contributions or share of membership by a country in the Banks
- All goods or works must be internationally advertised by placing a General Procurement Notice in a United Nations publication - Development Business or Development Gateway

Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008

14


IFI MULTIPARTNERSHIP
FORWARDING THE
GREEN DEVELOPMENT

Selection Process

- Borrower may decide to approach a single firm of its own choice
- Normal method of selection is for the borrower to invite proposals from three to six qualified and experienced firms


Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008

15




Tendering Process

- ▶ preparing the assignment terms of reference;
- ▶ preparing the cost estimate - the budget;
- ▶ preparing a short list of firms;
- ▶ determining the selection procedure;




Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008

16



Tendering Process

- ▶ sending the letter of invitation to submit a proposal to the firms on the short list;
- ▶ evaluating the firms' proposals and selecting a firm for contract negotiations; and
- ▶ negotiating a contract with the selected firm.



Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008

17



Bank Opportunities

Review the Opportunities Pipeline on-line

www.worldbank.org

www.iadb.org

www.adb.org

www.afdb.org

www.ebrd.com

www.caribank.org

- A list of other multilateral and bilateral organizations and selected pipeline opportunities are on the web site



Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008

18



IFI Net

www.infoexport.gc.ca/ifinet

- IFI Business Guides
- Success stories/case studies
- Summary of key info sources
- Free weekly IFI newsletter
- Part of the Department of Foreign Affairs and International Trade - Virtual Trade Commissioner www.infoexport.gc.ca


 Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008 19



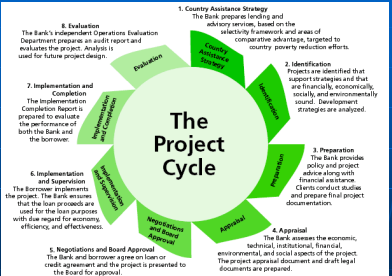
Identifying IFI Opportunities

- ⊙ Identify status of project in project cycle
 - look for Board Approval and establishment of Project Coordination or Implementation Units


 Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008 20



Know the Process: World Bank Project Cycle



The Project Cycle

 Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008 21

Project Cycle	What Type of Opportunity?	Who?	How to Find out More? (what information is publicly available)
Identification	Short-term, individual	WB/ADB	MOS
Preparation	Short-term, individual and competitive	WB/ADB and Borrower	MOS, PID
Appraisal	Short-term, individual	WB/ADB	PAD/SAR, Project Proposals
Negotiation	--	WBIADB and Borrower	GPN
Implementation and Supervision	Competitive (>US\$ 200K) and short-term individual	Borrower	SPN/RFP, MCAN
Evaluation	Short-term, Individual	WB/ADB	--

Business Development Marketplace

- Identify opportunities through Development Business or Development Gateway
- Review opportunities published on the Web site of in-country news papers and public documents
- Review Ongoing project contract awards and programs for potential sub-contract work

Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008

Business Development Marketplace


Development Business
www.devbusiness.com
Turn to Page 17 in your workbook

Development Gateway Market
www.dgmarket.com
Turn to Page 25 in your workbook

Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008

Development Business
- Online Version -

- EOI submissions and goods/equipment bids are often due 30 days from the on-line publication date, not from the issue date.
- You should log in and check for new procurement notices every few days.

 Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008 25

Register Your Firm - DACON


DACON Database - Data on Consultants

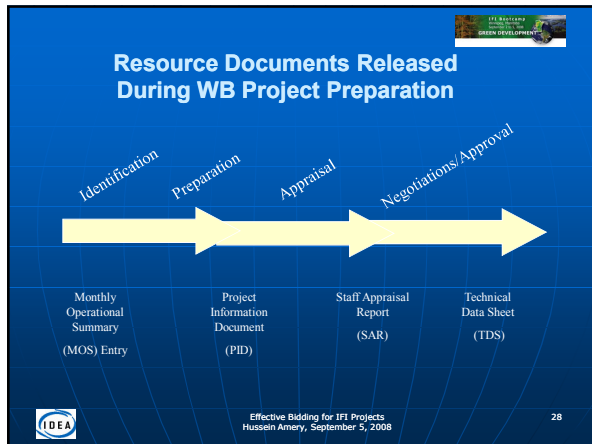
- Computerized registry of consulting firms
- Harmonized: Can send same forms (AfDB WB, IDB, ADB)
- Mandatory at AfDB, Asian Development Bank and Caribbean Development Bank.
- Should be reviewed and updated as necessary

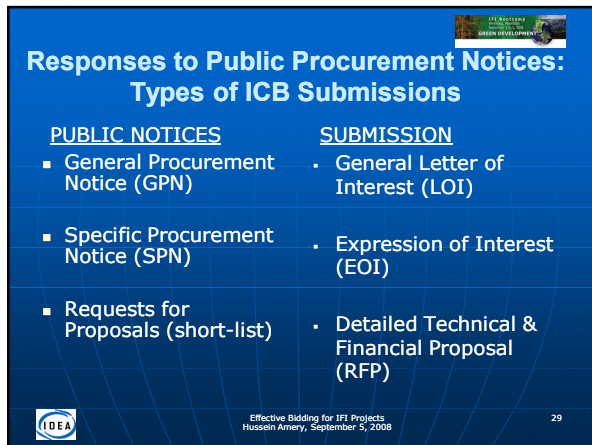
 Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008 26

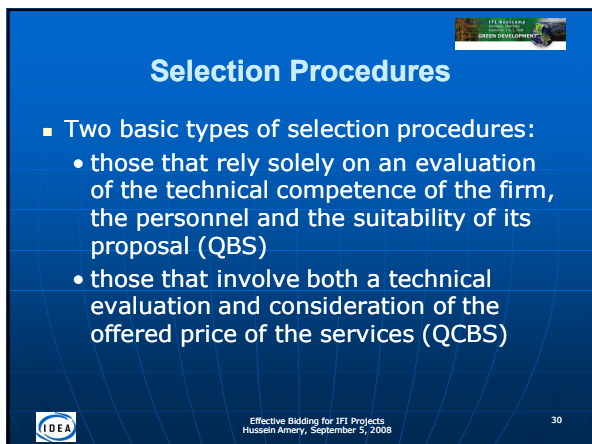
ADB Registration of Individuals:
DICON


- Experience in fields of expertise
- 3 years of experience in primary field
- No close relative in ADB

 Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008 27











Technical Evaluation with Price Considerations

- Consulting assignments can be broadly classified in terms of certain characteristics:
 1. Complexity of the assignment;
 2. Assignment's impact on the end product; and
 3. Probability that the proposals submitted by the invited firms will lead to comparable outputs.




Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008

31




Technical Evaluation

- Three principal categories:
 - The firm's general experience in the field of the assignment;
 - The adequacy of the proposed work plan and approach in responding to the TOR; and
 - The qualifications and competence of the personnel proposed for the assignment



Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008

32



Sample General Procurement Notice

The African Virtual University (AVU) has received a grant from the African Development Fund to finance the African Virtual University Support Project.


The principal objective of this project is to strengthen the capacity of a network of institutions coordinated by the African Virtual University (AVU) to deliver and manage quality Information and Communication Technology (ICT) assisted education and training opportunities in Regional Member Countries (RMCs).

The project includes the following components: (i) Establishment of Learning Centres and Connectivity Provision at AVU Partner Institutions; (ii) Teacher Training and Development Program; (iii) Mainstreaming Gender Issues Into AVU Operations; and (iv) Project Management.

Procurement of goods will be in accordance with the Bank's Rules of Procedure for the Procurement of Goods and Works. Acquisition of the services of Consultants will follow the Bank's Rules of Procedure for the Use of Consultants. Bidding documents are expected to be available in June 2005.


Interested bidders may obtain further information, and should confirm their interest, by contacting:

The African Virtual University (AVU)
 P.O. Box 25405 Nairobi, Kenya
 Tel. (254) 20 271 2056
 Fax (254) 20 271 2071 contact@avu.org




Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008

33




GPN Response: General Letter of Interest

- Brief one-page letter (a mini EOI)
- Introduce firm and 'generally' express keen interest in project
- Ask to be put on "mailing list"
- Enclose minimal material
- Don't rely on so-called "mailing list"; Track DB or DGmarket for Specific Procurement Notices.




Effective Bidding for IFB Projects
Hussein Amery, September 5, 2008

34




Short List of Firms: EOI

- Short list should normally comprise a wide geographic spread of firms who have submitted EOI
- not more than two firms of any one nationality
- at least one firm from another developing country
- 5-6 firms shortlisted



Effective Bidding for IFB Projects
Hussein Amery, September 5, 2008


35



Sample SPN


Invitation for Bids (IFB)
Kenya
Supply and installation of Broadband Satellite (VSAT) Services and equipment for AVU ODeL centers
Project Number: PZ1-IAZ-002
IFB No. AVU/ADB/IFB/005/03

1. The African Virtual University *has* received a Grant from the African Development Bank toward the Multinational African Virtual University Support project and intends to apply part of the proceeds of this Grant to payments under the agreement(s) resulting from this IFB for the *Supply and installation of Broadband satellite (VSAT) services and equipment for AVU ODeL Centres.*
2. The African Virtual University serves as the implementing agency for the project and now invites sealed bids from eligible Bidders for the Supply and Installation of Broadband satellite (VSAT) Services and Equipment or provide Internet Services for AVU ODeL centers located in Kenya, Uganda, Tanzania, Ethiopia, Djibouti, Somalia, Zambia, Zimbabwe, Mozambique and Madagascar.




Effective Bidding for IFB Projects
Hussein Amery, September 5, 2008


36



Response: Expression of Interest (EOI)


- Cover letter (ideally one page)
 - Convey interest and awareness of project/issues
 - State why you should be short listed
 - Intent to incorporate local experts (Identify them)
 - Ask to be short listed !


 Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008 37



Expression of Interest – Pre-qualifications

- Accompanying 3-6 page pre-qual statement
 1. Description of Firm/ Corporate Profile
 2. Project Experience - Relevant Ones; Brief Snapshots Language capabilities (Should EOI be translated?)
 3. brochures (Keep to a minimum)


 Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008 38



Prequalification Submissions

Weighted Evaluation Criteria

- Experience of the FIRM
 - measures if the Firm has demonstrated relevant experience with comparable projects or services
- Key Personnel
 - measures if the Firm is capable of offering the amount and type of skill and expertise required by the project
- Management Capability
 - measures if the Firm has the knowledge and management expertise to conduct a project of this size and scope

 Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008 39

Prequalification Submissions

Purpose: Identify a maximum of 6 qualified suppliers to present detailed proposal

- Experience of the FIRM
 - description
 - sample relevant project
- Key Personnel/
 - in house expertise
- Product
 - alliances and associates
- Management Capacity
 - understanding of project
 - management techniques
 - track record
- Financial Certifications
 - Declaration of solvency
 - bank interest to issue irrevocable
 - letter of credit (for advances over \$50k)
 - proof of liability insurance (if applicable)

Effective Bidding for IFI Projects
 Hussein Amery, September 5, 2008 40


Pre-qualification Criteria (Making the Short List)

- Legal Capacity (*eligibility*)..... (Yes/No)
- Financial Capacity..... (Yes/No)
- General Technical Background and Capability..... (40%)
- Experience in Similar Work..... (35%)
- Experience in the Country, or Similar Countries..... (10%)
- Language Capability..... (10%)
- Use of Local Consultants / Inputs (5%)

Effective Bidding for IFI Projects
 Hussein Amery, September 5, 2008 41

The Request for Proposal

Effective Bidding for IFI Projects
 Hussein Amery, September 5, 2008 42





Request For Proposal (RFP) Contents

The Letter of Invitation

- Other short-listed firms
- QCBS (*Quality Cost-Based Selection*) or QBS

- **Data Sheet**
 - Estimated person-months / Specifications and Content
- **Evaluation criteria**
- **Prescribed Proposal Format** (Standard Forms)
- **Terms of Reference**
- **Draft Contract and Specifications**



Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008
43




Proposal Evaluation

Technical Component

- Experience
- Approach / Methodology
 - Measures the adequacy and the reliability of the proposed means to achieve the expected results
- Proposed Personnel
 - Measures the quality of the expertise and skills offered by the consultant



Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008
44



Proposal Evaluation


Financial Component

- Value for Money
- Measures the cost of the proposed services ...


Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008
45


Terms of Reference

- a precise statement of the objectives of the assignment;
- the scope and time of the required services;
- the inputs to be provided by the borrower; and
- particulars of the output (i.e. reports, drawings, etc.) required of the consulting firm.

 Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008 46


Technical Proposal Standard “Forms”


- Submission letter
- The Cover
- Section A – Introduction
- Section B – The Firm’s References
- Section C – Project Appreciation
- Section D – Methodology and Work Plan

 Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008 47

Technical Proposal Standard “Forms”


- Section E – Comments and Suggestions on TOR
- Section F – Activity (Work Schedule) and Deliverables/ Team Members Deployments
- Section G– Composition of Team and Curricula Vitae of Team Members

 Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008 48




Preparing the Technical Proposal

49




Overall Check List

- **Capability:** Are you capable of implementing the RFP?
- **Competitiveness:** How competitive will you be; who and how many competitors?
- **Clarity:** Will your proposal clearly respond to the RFP, and outline the organization's plan, giving general and specific information required?




Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008

50



Preparing the Proposal: Overview of the Process

1. Assign Responsibility – Prepare Matrix
2. Conduct a site visit
3. Develop and flesh out project methodology/ approach
4. Prepare draft technical proposal, including initial draft financial proposal
5. Secure letters of support/agreement
6. Finalize detailed financial proposal
7. Review final proposal for eligibility/selection criteria and Submit to Funder



Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008

51

**IFI MULTIPARTNERSHIP
FOR RURAL
GREEN DEVELOPMENT**

Conducting a Site Visit

What do you do on a site visit ?

- confirm players and partnerships
- verify fit / match
- develop skeleton of your project, including methodology

What do you need to bring back to Canada ?

- key proposal elements / concept
- country scenario
- local costs

IDEA Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008 52

**IFI MULTIPARTNERSHIP
FOR RURAL
GREEN DEVELOPMENT**

Key Points: Proposal Design

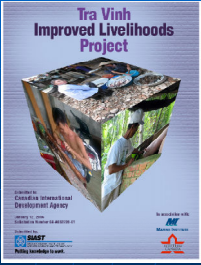
- Ensure Consistency with all priorities of donors and country
- Proposal should enhance the capacity of client to effect change
- Realistic and resources should be available - within the available timeframe
- Partners with specific and complementary project roles, Clarify expectations (\$\$)
- Includes inputs only from Bank Member countries

IDEA Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008 53

**IFI MULTIPARTNERSHIP
FOR RURAL
GREEN DEVELOPMENT**

The Cover

- Nice packaging conveys professionalism, creativity, innovativeness
- Use quality paper, binding, lots of colour,
- creative graphics reflecting the country or sector



IDEA Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008 54

Map: Focus of Work

Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008

Section B: Firm's References


- One-two page project quals / profiles (formal requirement)
- Narrative section describing firm and introducing team via 2-3 sentence bios. (sell, sell, sell)
- This section is where you sell your qualifications. With particular focus on individual team members and results of assignment.

Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008

Demonstrate Firm's Experience: The Project Profile


Key Project Data	Project Description	Personnel
<ul style="list-style-type: none"> • Project Name • Country • Project Location • Name of Client/ Funder/ Partner • Start Date/ Completion Date • Reference Number 	<ul style="list-style-type: none"> • Description of Project • Description of Services Provided 	<ul style="list-style-type: none"> • Number of Staff • Number of Person Months • Name of Key Staff And Functions Performed <ul style="list-style-type: none"> Financial Data - Value of Services - Fees/Services - Reimbursables - Procurement - In-kind


Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008



Section C: Project Appreciation


- Is supported by statistical evidence, where appropriate
- Is supported by statements from authorities and tied to goal and purpose
- Is stated in terms of clients, funders and ultimate beneficiaries


 Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008 58



Project Appreciation


- Focuses on development problem of reasonable dimension
- Is based on the conclusions of a needs assessment
- Does not make assumptions

 Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008 59




Section D: Approach, Methodology and Workplan

- The guts of the proposal
- Use graphical models to illustrate your strategy and approach
- Use lots of tables (logical framework style) to lay out your methodology and workplan.
- Divide project into Activities and Tasks (as with 'Work Breakdown Structure', WBS.
- Summary tables, frameworks, bullet points make it easier for them to read, understand, and evaluate.

 Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008 60

Project Work Plan

- Flows naturally from the appreciation and goal / purpose/ expected results
- Clearly describes project results and corresponding activities
- States reasons for method of delivery of packages (in terms of results)
- Describes sequence, duration and timing of activities
- Presents a reasonable scope of activities achievable within the time and funds allotted




Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008

61

Management Strategy & Implementation Strategy

- Clearly describes management strategy
- Describes staffing of project both in Canada, other locations, and the field
- Describes roles and responsibilities of Canadian and field partners
- Describes implementation approach concerning critical conditions and risk assessment




Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008

62


Section E: Comments / Suggestions on TOR

- Here's where you demonstrate understanding of the assignment
- Make suggestions as to other objectives, results, deliverables
- Largely narrative section basically reiterating the TOR. But perhaps more clearly than they were written.




Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008


63



Activity Schedule


- Project time-table (Activity by activity)
- GANTT/Bar Chart showing timeline of project, activity by activity, dates of key deliverables
- Demonstrate Level of Effort of individual team members
- Bar Chart showing person days for each team member for each activity


 Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008 64



Activity Schedule


- What they're looking for here is to make sure you're giving sufficient days to the key experienced people (and to the locals).
- You'll have a chance to reallocate (to an extent) during negotiations, inception and implementation
- Use the Forms provided

 Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008 65




Personnel Section Structure

- Provide a summary chart demonstrating team experience
- CV's of Team Members
- Page limited. Usually 3 or 5 pages
- Separate CVs with color dividers
- Make sure they're signed, even if by proxy

 Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008 66


Personnel and Curriculum Vitae


- Only identify personnel requested
- Identification of key personnel can be the key to a winning proposal (*up to 50% of the points!*)
- Balance between local and international consultants
- Key personnel have good mix of domestic and international experience
- In many cases, key personnel should have a strong academic background (*i.e., Masters degree*)

 Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008 70


Assessing Proposed Personnel


- General qualifications - education and training, length of experience, type of position held, time with the firm, etc.
- Adequacy of the project - suitability
- Language and experience in the region - background in developing countries similar to the country in which the assignment is to be conducted and linguistic ability

 Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008 71




Preparing the Financial Proposal

 72




Financial Proposal

- \$ LUMP SUM CONTRACTS (QCBS)
- \$ Pricing will depend much on analysis of the competition & knowledge of their rate standards
- \$ Be sure to research applicable taxes
Sometimes RFP provides this info; sometimes not




Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008

73




Financial Proposal

- Respects all funding IFI financial regulations and standard rates
- Uses unit costs based on current prices in Cdn\$, US\$, and local currency
- Activities scheduling well planned considering cash flow constraints




Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008

74



Financial Proposal

- Distinguishes project activity costs from management costs
- Reflects a proportionate balance between program and management costs
 1. technical assistance, capital costs
 2. training, fellowships
 3. management



Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008

75

IFI BEST PRACTICE
HOW TO WIN
GREEN DEVELOPMENT

Financial Proposal

- Provides sufficient financial resources to manage the project activities effectively (realistic)
- Provides a financial management strategy not just a budget

IDEA Effective Bidding for IFI Projects Hussein Amery, September 5, 2008 76

IFI BEST PRACTICE
HOW TO WIN
GREEN DEVELOPMENT

Fees

- A firm may place whatever rate they choose for competition. A consultant organization should be able to prove that he/she is worth such rate.


IDEA Effective Bidding for IFI Projects Hussein Amery, September 5, 2008 77

IFI BEST PRACTICE
HOW TO WIN
GREEN DEVELOPMENT

Reimbursable Expenses

- Reimbursable expenses are items such as travel, per diem and other items not related to fees
- In preparing reimbursable expenses, such as airfares, put low cost as these reimbursable expense and therefore are not limited. Some IFI's work on bid price reimbursables.


IDEA Effective Bidding for IFI Projects Hussein Amery, September 5, 2008 78




Per Diems

For per diems, there are 2 ways of budgeting:


1. You can get the prescribed per diem rate per country based on regulations and submit Actual Receipts of your hotel bills.
2. There is also a **Negotiated Flat Rate Per diem** wherein it is a much lower rate but the firm will not be required to submit receipts.


 Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008 79



Procurement


- Ensure source is part of member country
- Identify how your proposal meets specifications
- Identify country of origin
- Critical to build in role for local inputs

 Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008 80




Financial Formats

- There is a specific financial requirement attached to each RFP and a specific form.
- Review the Data Sheet and the TORs carefully.

 Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008 81

IFU MULTIPARTNERSHIP
FOR THE
GREEN DEVELOPMENT

Tips




Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008

82

IFU MULTIPARTNERSHIP
FOR THE
GREEN DEVELOPMENT

General Tips on Getting Contracts

- Learn how the funder operates
- Determine whether the goods or services your Institution offers are needed in projects financed by the funder
- Find out what opportunities are coming up




Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008

83

IFU MULTIPARTNERSHIP
FOR THE
GREEN DEVELOPMENT

General Tips on Getting Contracts

- Decide where your Institution has the best chances of winning
- It may be helpful to employ a local representative who knows the country and the language to keep you informed
- Travel to the country and make direct contact with relevant agency officials




Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008

84


General Tips on Getting Contracts

- Obtain bid documents as soon as they are available from the funder
- Read the bid documents and evaluate criteria carefully

 Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008 85


General Tips on Getting Contracts


- Make sure your bid is priced competitively and complies strictly with all specifications and contractual conditions stipulated in the documents
- If you did not win, analyze the reasons, learn from your experience

 Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008 86

Writing Tips


- Present thoughts coherently and logically
- Use transitional words and phrases
- Use development terminology, avoid jargon
- Write simply, avoid long sentences
- Maintain your theme(s) throughout
- Support statements with facts

 Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008 87




Writing Tips

- Avoid gratuitous statements (“We understand, We recognize, etc.”)
- Demonstrate your commitment and capability in what you write
- Make your responsiveness to the RFP apparent in your ideas and language (*Compliance is critical*)




Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008

88




How to Win?

- Strategize
- Know your funder
- Practice, Practice, Practice
 - Don't expect to win the 1st time.
 - The ratio of success is usually 1 in 5



Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008

89






Integrated Development Enterprise Associates

Hussein M. Amery, M.A.
Chief Executive Officer

IDEA
225 Brentford Ave., North
Ottawa, Canada K1T 2P3
Tel: 613-735-5566
Fax: 613-735-5566
Email: amery@idea.ca
www.idea.ca



SIAT IDEA
110 Promenade du Portage
Ottawa, Québec K1K 2P1
Tel: 613-735-5566
Fax: 613-735-5566
Email: amery@siat.ca
www.idea.ca



Hussein Amery
Senior Advisor
Business Development

Ottawa Bureau
110 Promenade du Portage, Lower Level
Ottawa, Québec K1K 2P1
Phone: 613-735-5566
Toll Free: 866-754-4096
Mobile: 613-735-5566
Fax: 613-735-5566
E-mail: amery@siat.ca
www.siat.ca



SIAT
SOCIÉTÉ CANADIENNE D'INNOVATION ET DE TECHNOLOGIE
Putting Knowledge to work.



Effective Bidding for IFI Projects
Hussein Amery, September 5, 2008

90
